Counting rule management V2

Contents 🔗

Introduction 🔗

See 🟩 VRD-5038: Improvements to the counting rules setup `DONE`

This design mainly aims to:

- Keep the overview with so many rules
- Make it easier to predict what the effects of changes in rules are
- Make it easier to change or add rules for a certain owner without affecting another one
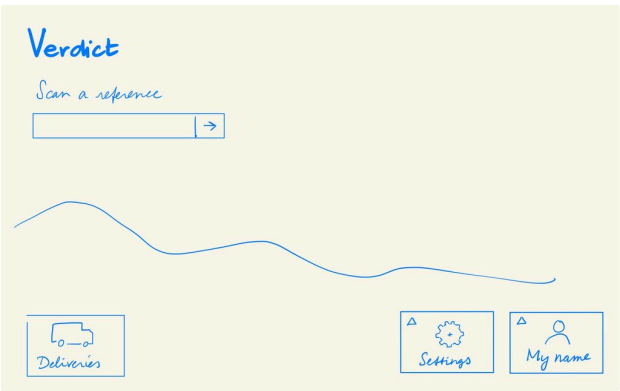
In this proposal there are two kinds of counting rules:
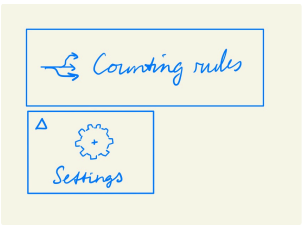
1. Owner rules
2. Generic rules

First the owner rules for the owner of the item are checked. If there is no match, the generic rules are considered.

Inspecting the routing for an owner 🔗

Because the new counting rules are a new feature, we use the new navigation to go there. Go to Home:
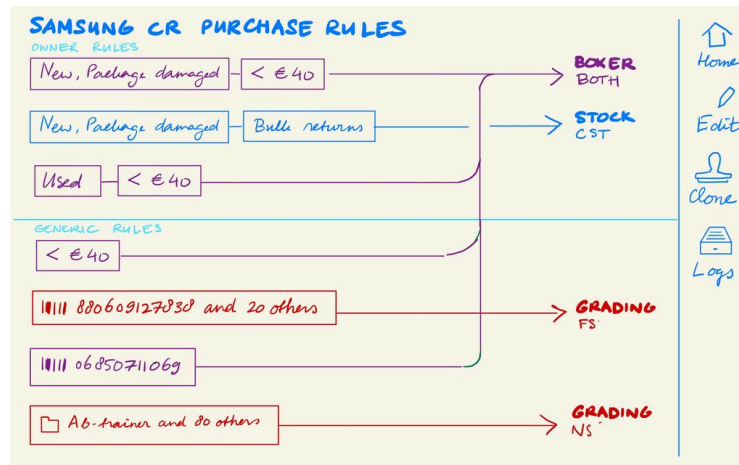

Then click on Settings:

Then click on 'Counting rules'. You see the new rules:

Click on the owner:

On top are the owner rules for the specific owner. Below it are the generic rules. So this view shows the complete routing for the owner. The design above is actually a realistic presentation of 'Samsung CR Purchase'.

Editing owner rules 🔗

In the view for the owner rules (image above) click on 'Edit' or click 'Edit' in the owner rules table. You see this form:

Every row is a rule. You can change rules, add them, remove them, and edit them.

Edit a single owner rule 🔗

Click on the pencil to edit a rule. The rule form opens:

It is the same as we currently have, with a few changes:

- The title field has gone
- Pregrade allows multiple values
- There is no Owner or Suppliers field
- Product references, Brands and Categories are multiline fields.

Entering multiple values 🔗

Multiple values, like product references can now be inserted in a single text field:

Empty lines are automatically removed on save. This applies to Product references, Owners, Brands and Categories. It does not apply to Feedback groups.

Remove a rule 🔗

Click on the trashcan next to the rule:

Changing priorities 🔗

Every row in the Edit form has a drag opportunity on the left side, the two horizontal lines). You can use these to drag the row up or down.

Editing generic rules 🔗

Go to the rules screen:

COUNTING RULES

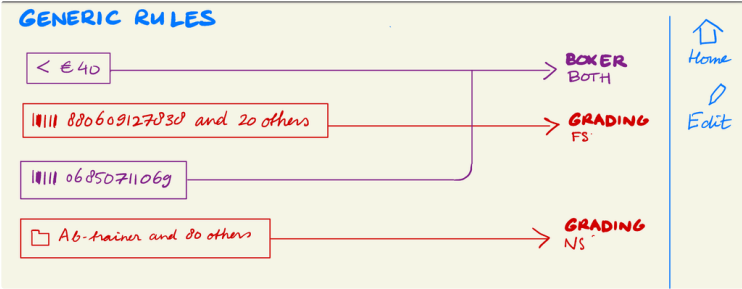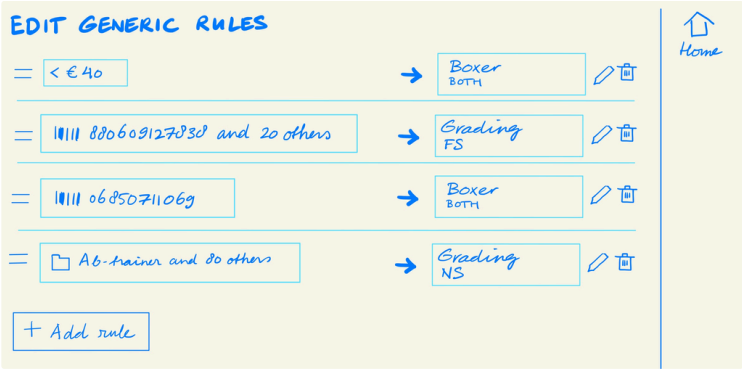| All owners | Owners with rules |

Owner ⌄	Rules	
Amazon Laas Plaza	3	✏ Edit
Amazon WHD	2	✏ Edit
Beacon Lighting	3	✏ Edit
Samsung CR Purchase	4	✏ Edit
Et cetera		

⌂ Home
⇄ Generic rules

On the right, click on 'Generic rules'. You see the generic routing page:

GENERIC RULES

- < €40 → **BOXER** BOTH
- ‖‖ 880609127830 and 20 others → **GRADING** FS
- ‖‖ 0685071106g
- 🗀 A6-trainer and 80 others → **GRADING** NS

⌂ Home
✏ Edit

Click 'Edit'. You see this page:

EDIT GENERIC RULES

☰	< €40	→	Boxer BOTH	✏ 🗑
☰	‖‖ 880609127830 and 20 others	→	Grading FS	✏ 🗑
☰	‖‖ 0685071106g	→	Boxer BOTH	✏ 🗑
☰	🗀 A6-trainer and 80 others	→	Grading NS	✏ 🗑

+ Add rule

⌂ Home

Adding generic rules works exactly like adding owner rules.

No rules configured yet 🔗

If there are now owner or generic rules, you see a special message:

EDIT GENERIC RULES

There are no generic rules yet.

+ Add rule

⌂ Home

Cloning rules 🔗

Go to the view of owner rules:

SAMSUNG CR PURCHASE RULES

OWNER RULES

- New, Package damaged — < €40 → **BOXER** BOTH
- New, Package damaged — Bulk returns → **STOCK** CST
- Used — < €40

GENERIC RULES

⌂ Home
✏ Edit
🏷 Clone
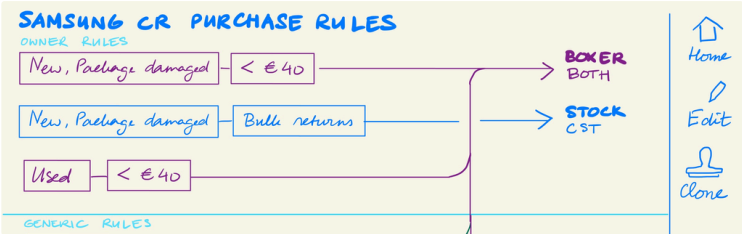
Click on the right on 'Clone'. You see a new page with all owners that do not have any rules yet:
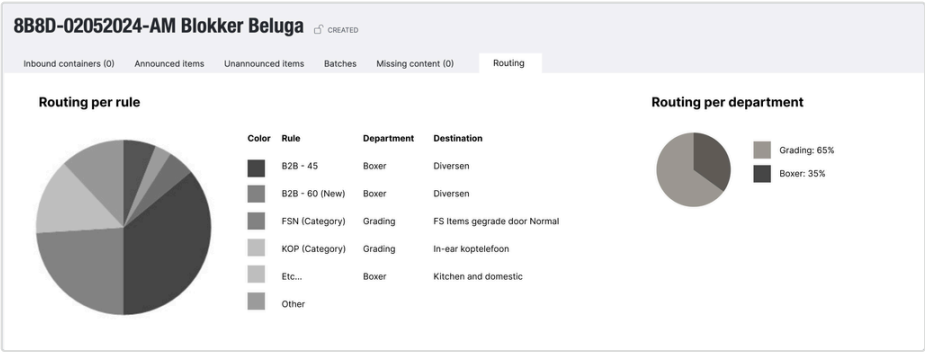
Check the owners and click 'Clone'.

Preview of the routing for a delivery 🔗

Global overview 🔗

Open a Delivery. Then click on the tab 'Routing':

It shows a preview of how the announcements will be routed with the current rule setup.
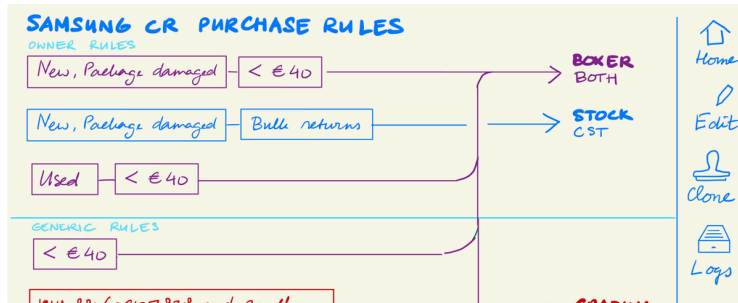
Detailed overview 🔗

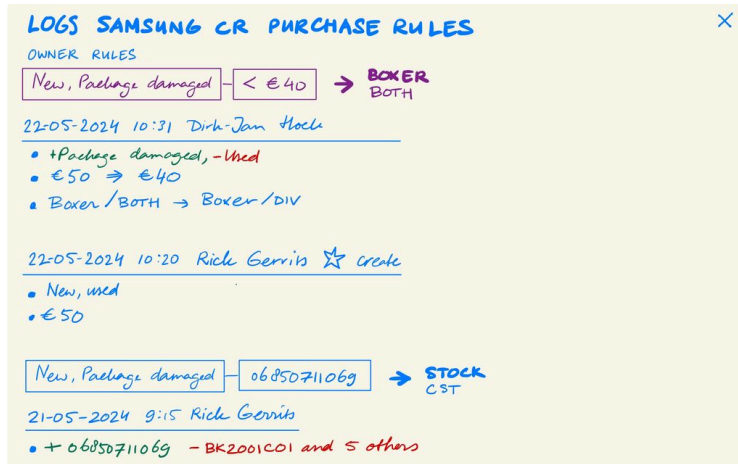Open a Delivery. Then click on the tab 'Announced items'.

When an announcement has not been counted yet, you can see the expected routing of the announcement in the 'Location' column. Note: this sketch is still based on the old announcements table.

Viewing a change log 🔗

Go to the rules page of an owner:

On the right click on 'Logs'. You see this popup:

The logs are grouped per rule and within a rule they are grouped by user and time; if changes happened within 5 minutes and were done by the same person they are presented in one group. The order is on priority here.

Every bullet represents changes in one rule. Green shows added data, red shows data that was removed.

Migration 🔗

Because these rules are much different than the old ones, they will all have to be created again, manually. To reduce the risk we can implement the predicted routing from the Delivery page (see later on) before we make that routing really active. We do not need the views perse, but it should be ready in the database. In short: we show predicted routing for the new rules but we apply the old routing during the counting.